

## UX/UI PROCESS

### Early Meeting and Collaboration

Ideally, UI/UX team is involved before Feature is proposed to Product Steering Committee to assist with presenting the vision of the feature to the committee.

(UI/UX is involved before feature is pre-groomed to help determine the appropriate scope of the feature. The PM and UX teams work together to develop the PM's vision creating work flows and UI components that improve the user experience leading to

increased/decreased scope.) Initially, the Researcher, Interaction Designer, and Product Manager can communicate with low fidelity sketches.

## Hypothesis

The Product Manager will create user stories with the necessary UX requirements. The stories will then be taged with the proper Product Design or UX tag.





#### Interaction Design

Interaction Designer creates user workflows based on the customer research and input from the Product Manager.

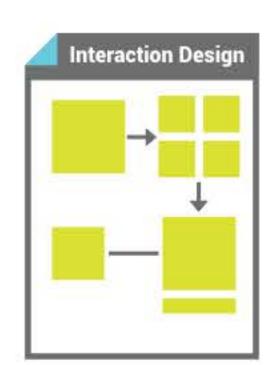
Interaction Designer begins refining the low fidelity documents into a single consumable

document that is well annotated for dev. Product Managers can use the documentation

to present additional features or findings to the Product Steering Committee. Low or medium fidelity drawings can be used

for the pre-grooming process to help identify the scope of the feature.





Based on the results of the usability tests it may be necessary to cycle back to the interaction designer to implement new findings. Then the new wireframes would need to be validated through new user testing.

Rinse & Repeat

#### **Visual Design**

Visual Designer produces UI design. The Visual Designer uses the final high fidelity document, including any changes from the customer research, as well as input from the Product Manager.

While the high fidelity document details the functionality of the UI, the visual design shows the look and feel of the UI (colors, layout, styles, and all element states).





#### **User Testing**

Reseacher takes the prototype and validates it with our customers through usability testing.

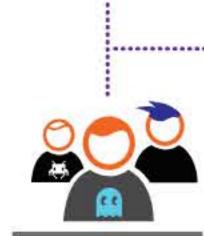
If usability issues are found this may result in returning to Interaction Design or Visual





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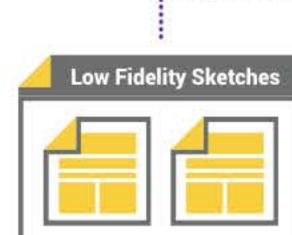
PRODUCT Manager



UI/UX Team

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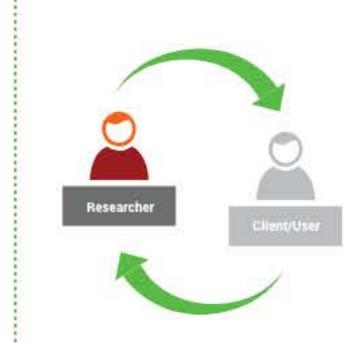


#### **Hypothesis Validation**

Product Manager meets with the UX team members, UX Manager, IXD, and Researcher to discuss potential research angles that would challenge current thinking and assumptions about how the user will use the feature.

The researcher and IXD will create low fidelity wireframes to take to targeted users. The Researcher will work with the PO to set up onsite observations where we prefer to take 1 researcher, 1 IXD, 1 PO, 1 Dev, or 1 QA and 1

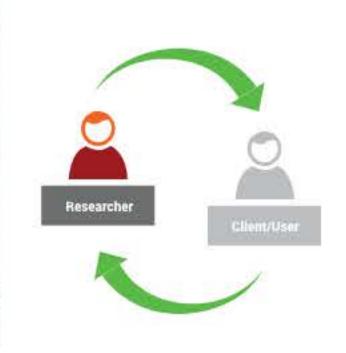
additional UX team member. Researcher conducts user studies with customers to test the assumptions about the user workflows (Research results document is

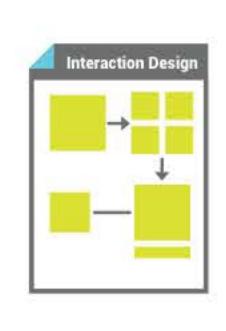




#### Interaction Design Validation

Researcher takes the wireframes and creates usability tests with straw man or low fidelity prototypes.



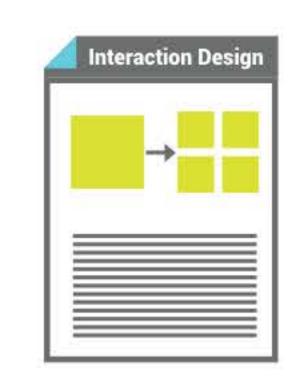


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#### Interaction Design Finalization

The Interaction Designer delivers finalized wireframes documented and defined prior to handing to the Visual Designer.





#### **Prototyping**

Prototyper uses final UI design, including any changes from the customer research, to build a working mockup.

Mockup is used by development to build the feature; mockup can also be used to demo the feature to stakeholders and better illustrate functionality in motion studies, timing, and click interactions prior to release.

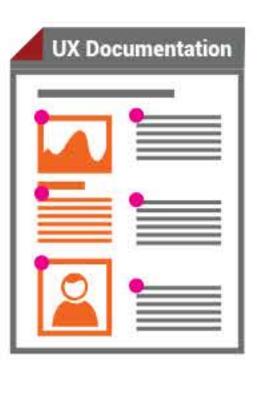




#### **Submit to Development**

The final High Fidelity and annotated document is submited to Development.

If any questions or gaps are found by Development they are brought back to the UI/UX team.





## PROJECT: MULTI & OMNI CHANNEL

#### COMPANY

NICE InContact

#### AFFECTED PERSONA

Agent Persona

#### **MARKET RESEARCH**

- Market Research showed the prevalence of the term "Omni-Channel" being used but having no clear definition.
- Some competitors called "Omni-Channel" the ability to turn a phone call into a video chat while others said it was the ability to handle multiple contacts at once.

#### **CUSTOMER RESEARCH**

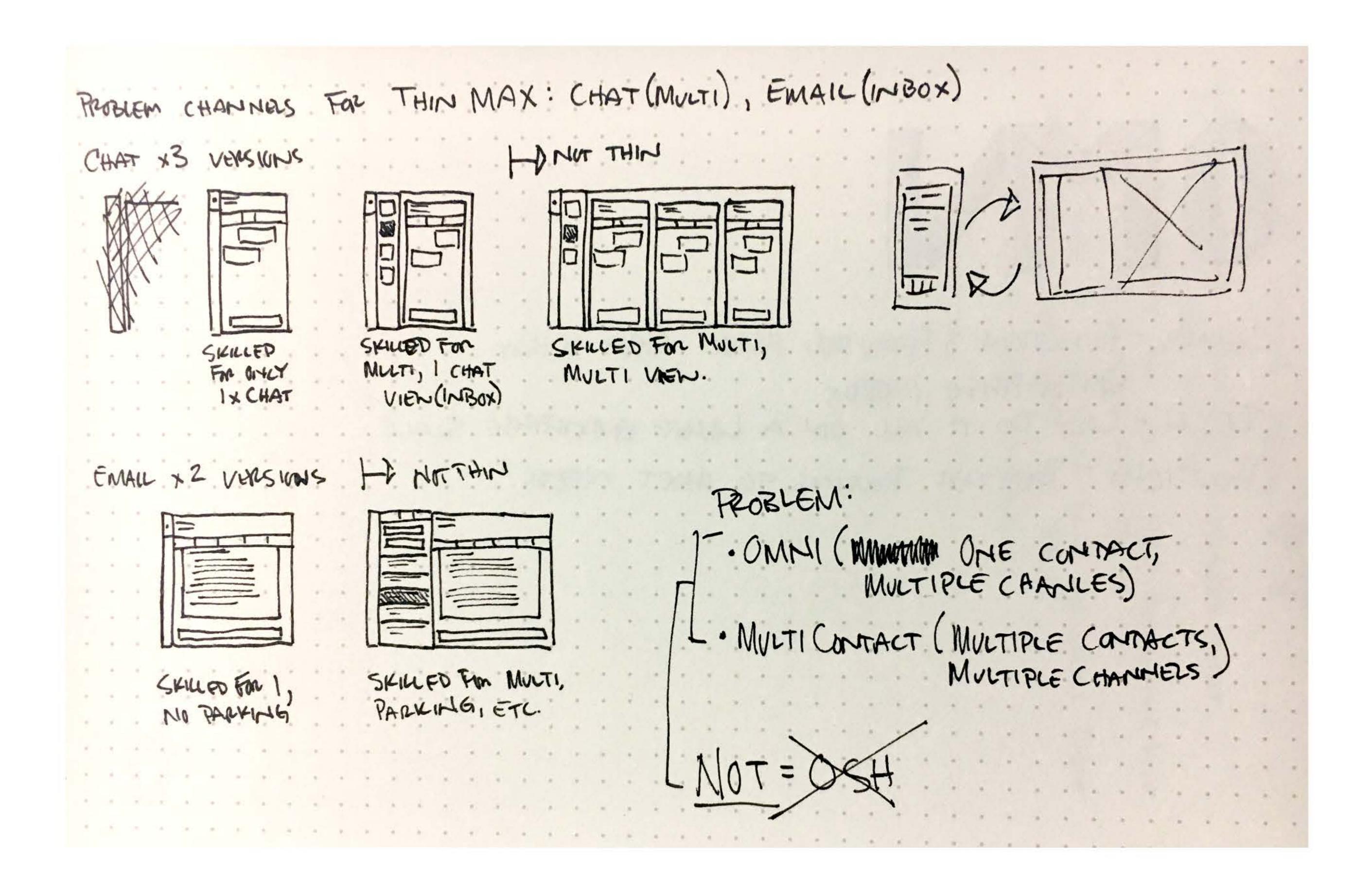
- Customers were confused by the lack of a solid deffinition for "Omni-Channel."
- Research showed that a portion of our customers wanted the to give better customer service and have true first call resolution.
- Other customers wanted to move through as many customers as quickly as possible, a churn and burn mantality.

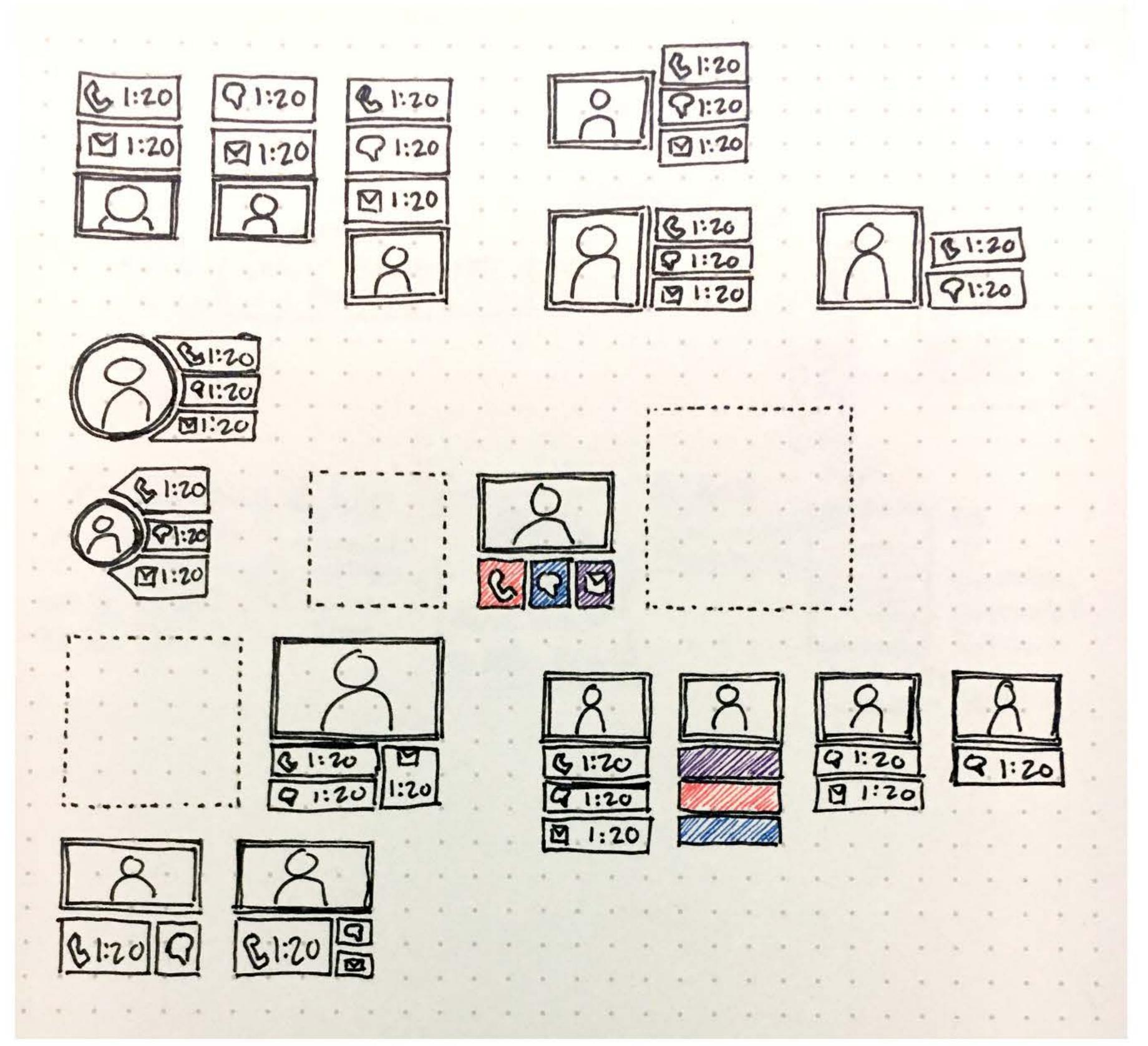
#### **GOALS**

- Create an experience where the Agent can handle a Customer channel agnostic (one customer across any channel).
- Further allow Agents to handle more then one customer at the same time across any channel.



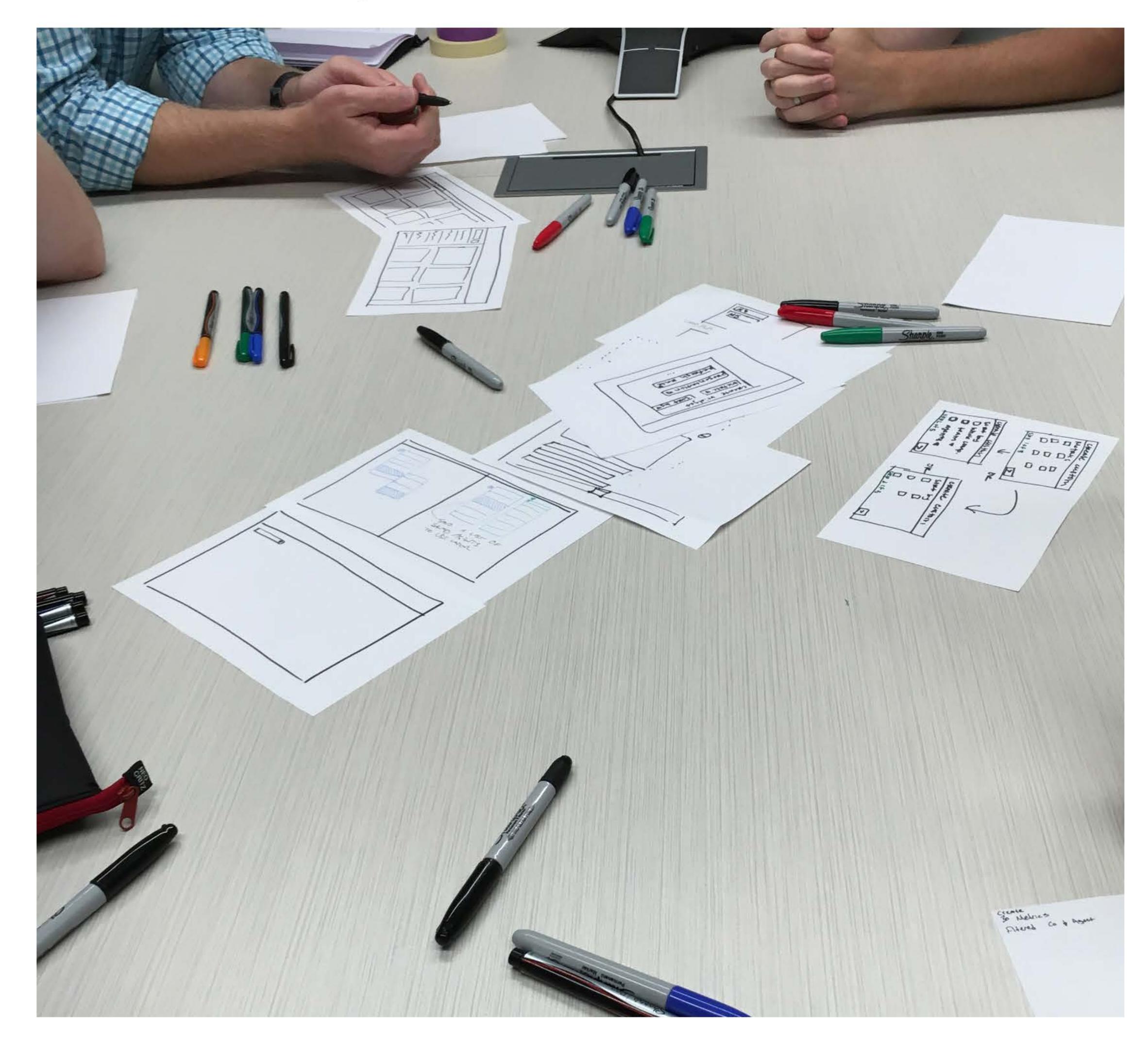
#### **EARLY SKETCHES**

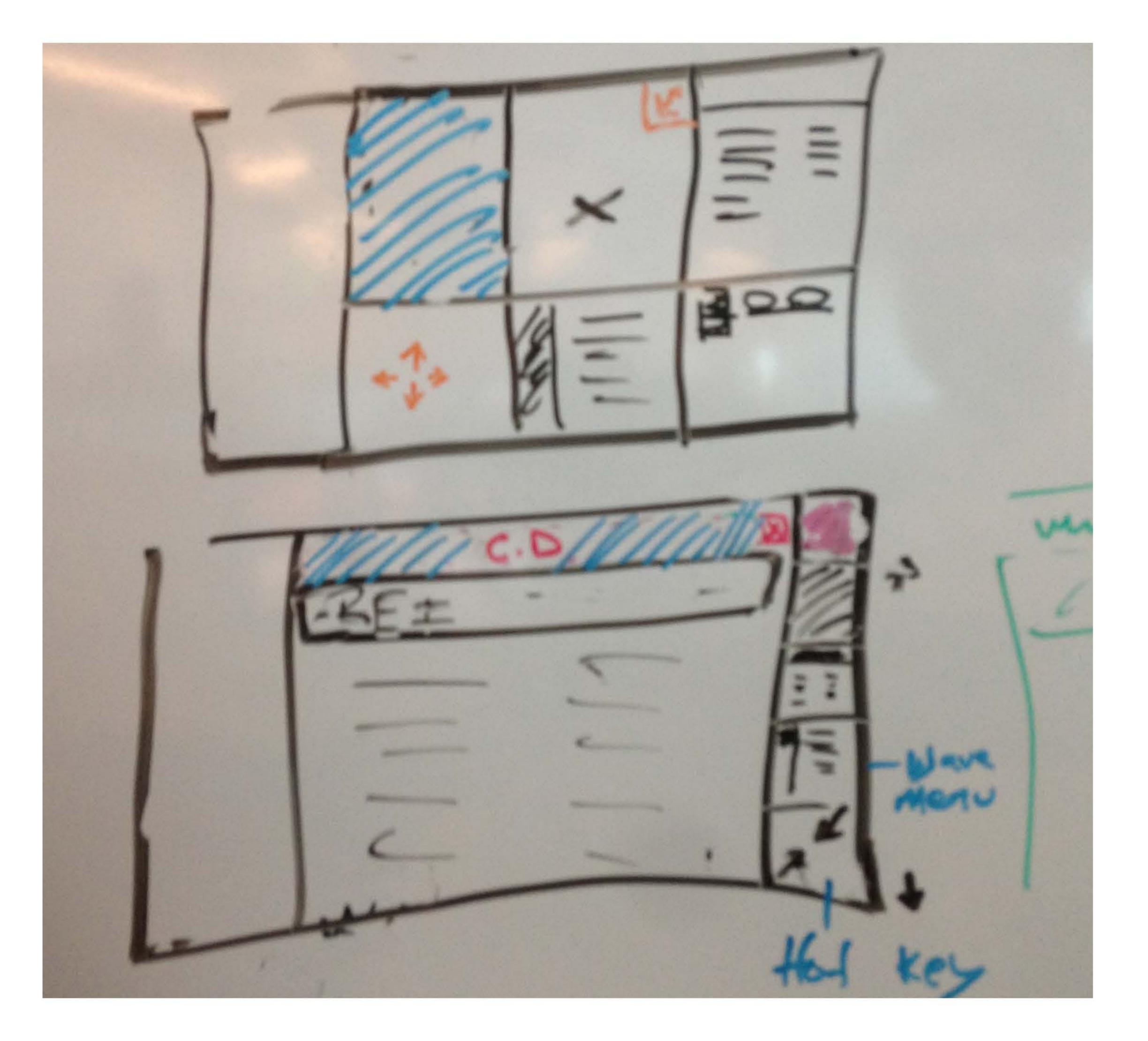




#### WORKSHOP

Lead team 10x10's for fast paced ideation.



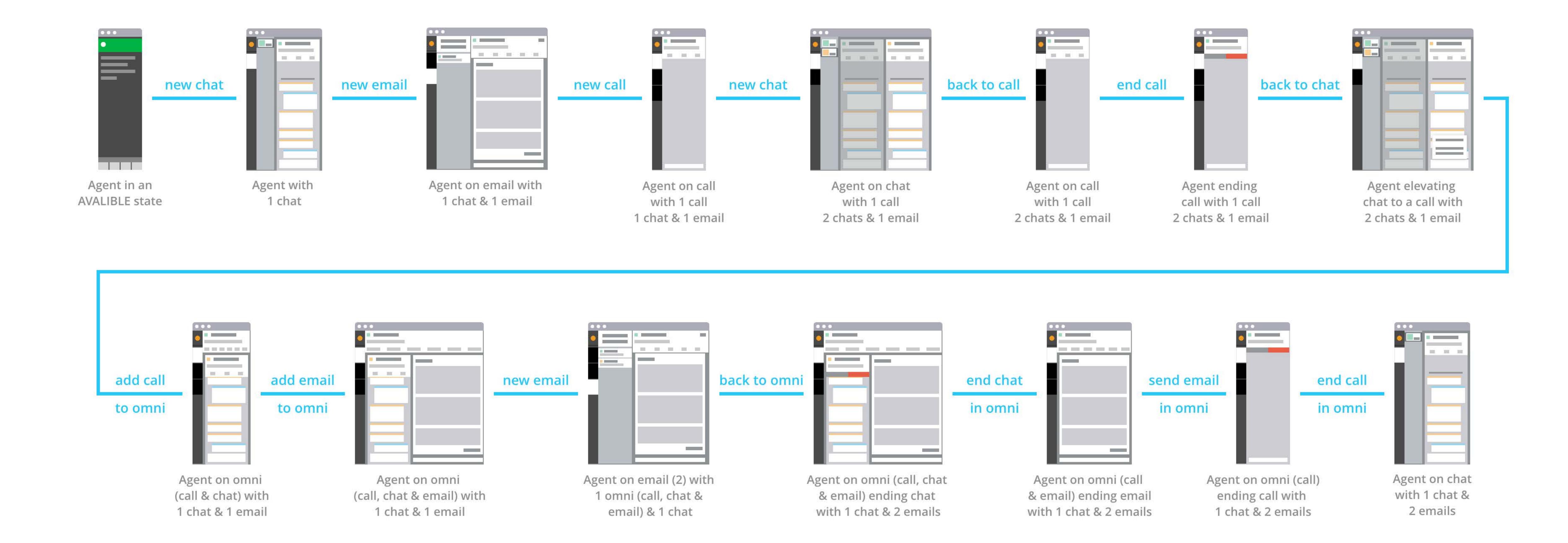






#### AGENT STORY FLOW FOR FEATURE COMMUNICATION

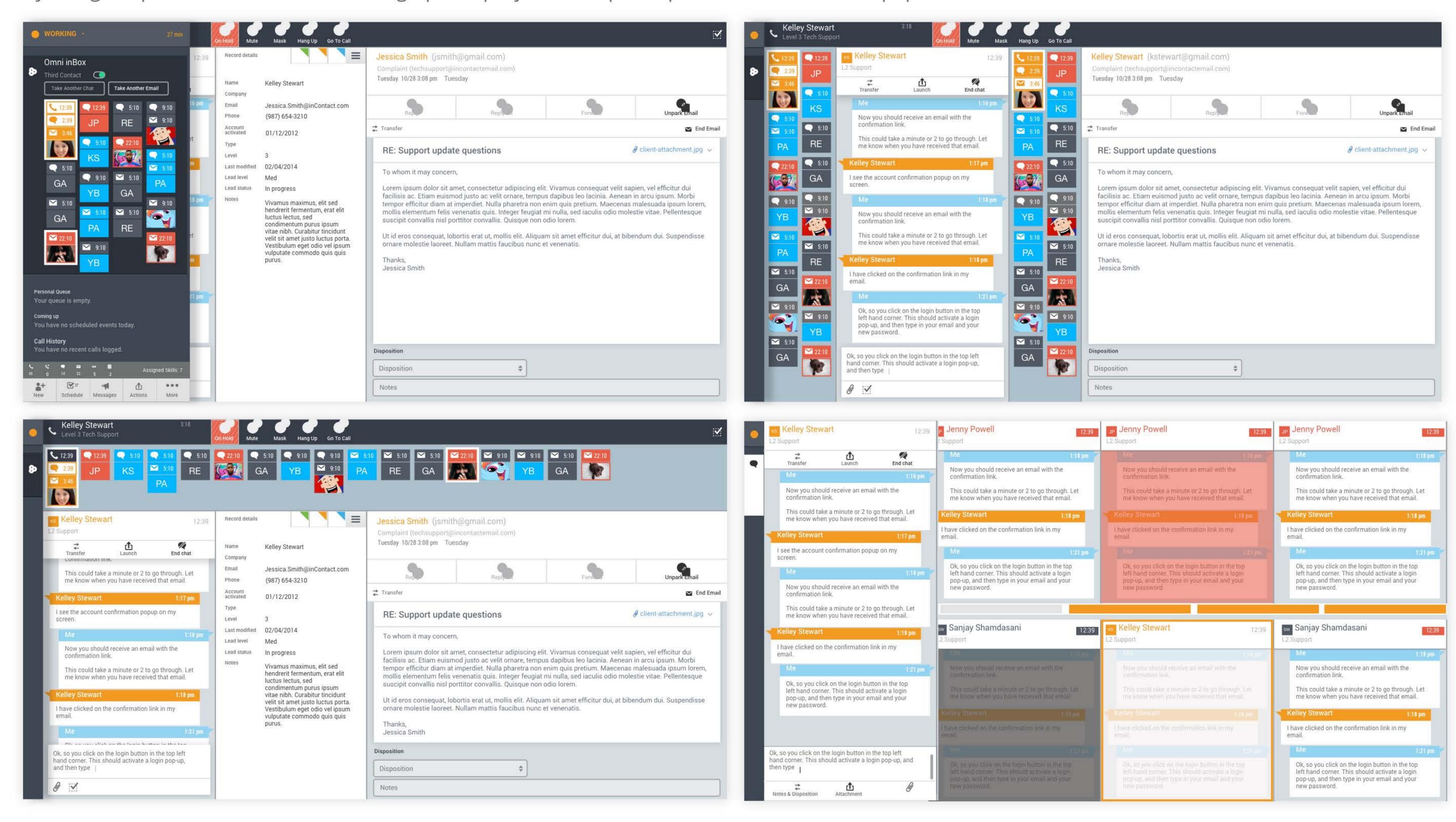
This user flow tells a story about the new feature to help communicate the vision to Executives, Customers, R&D, and others, a full prototype based on this initial story was used for later testing.





#### **EARLY DESIGN EXPLORATION**

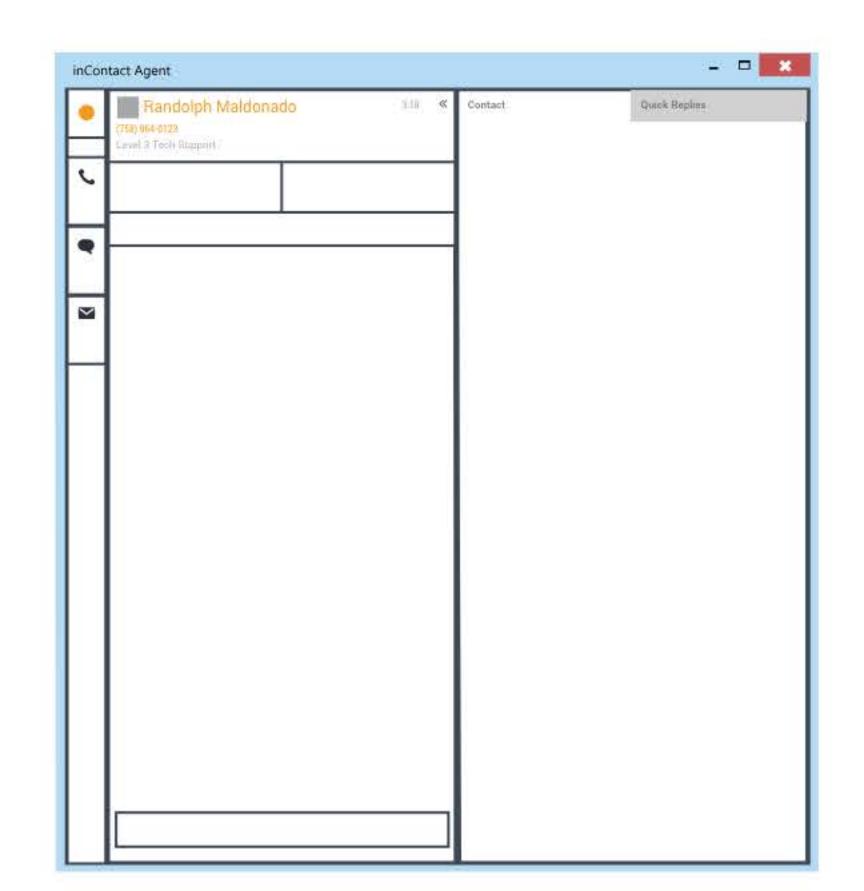
There was some early design exploration for the VP heading up this project to help him put his ideas down on paper.

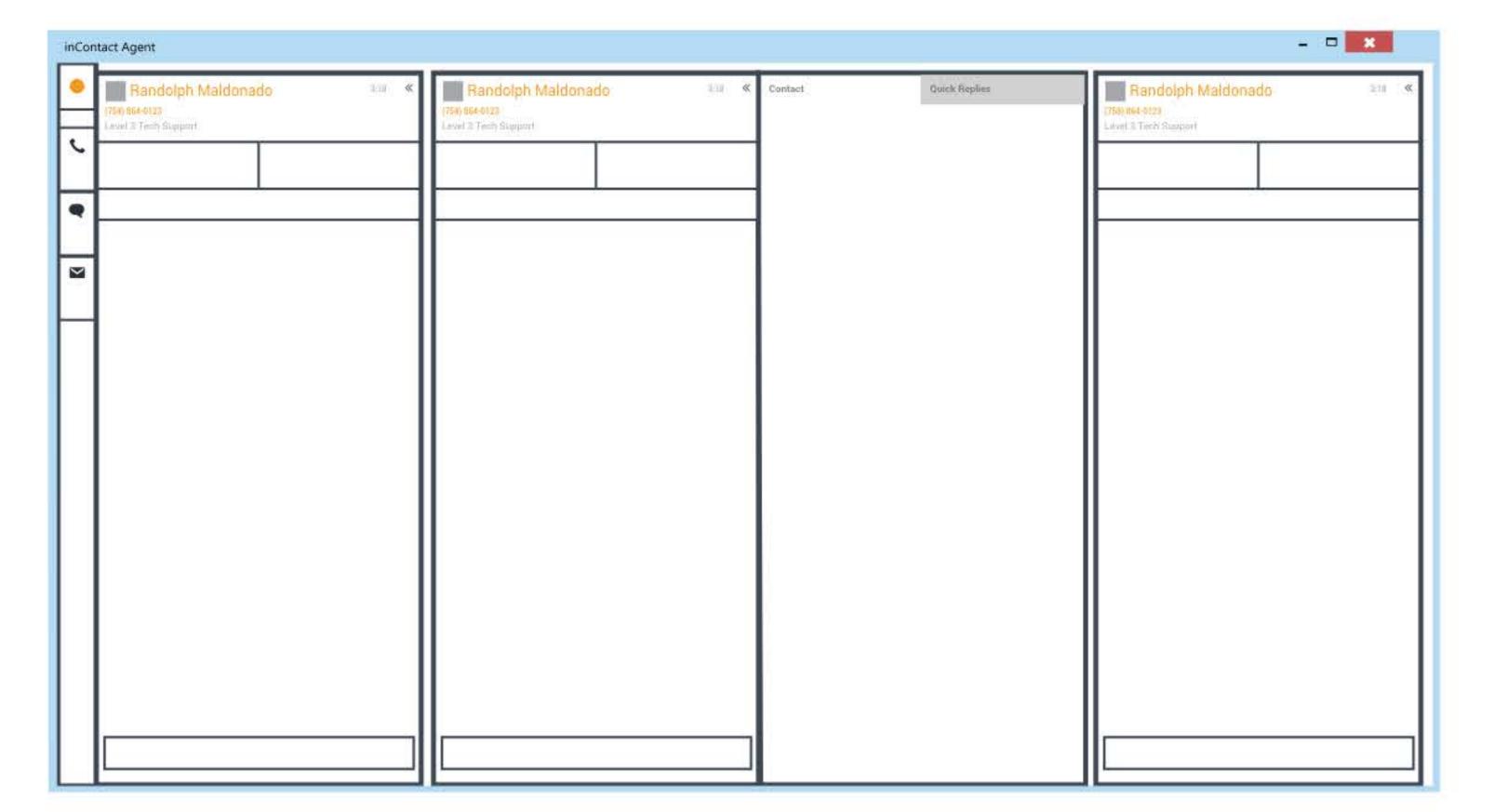


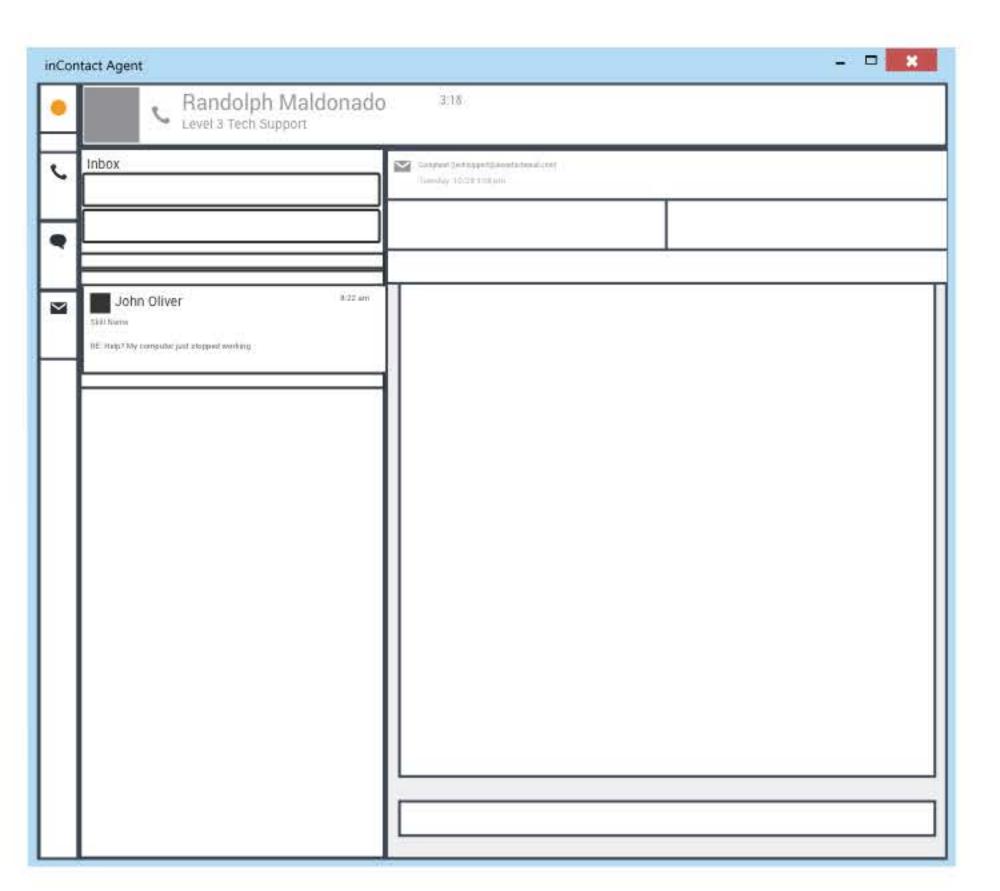


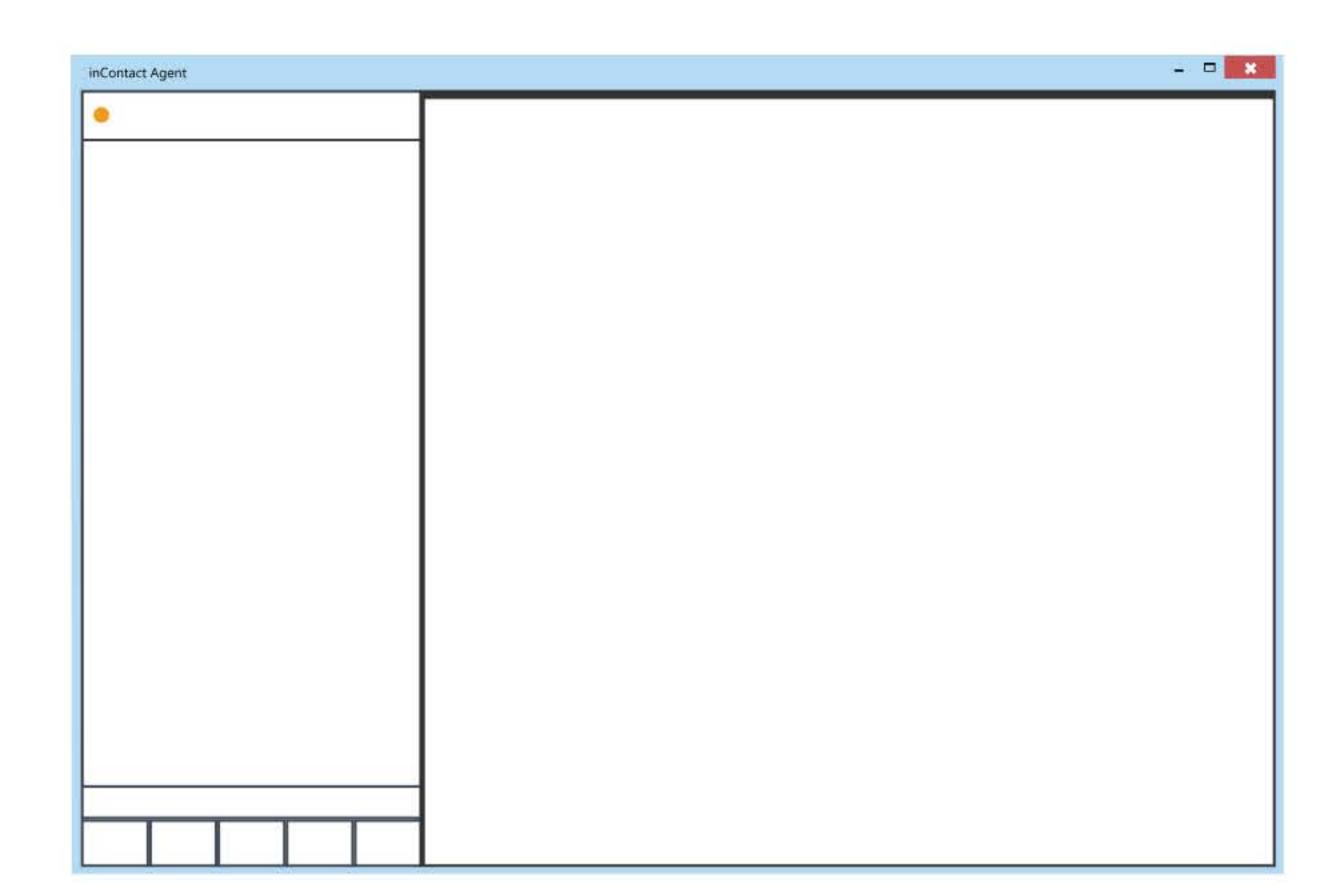
#### WIREFRAMES

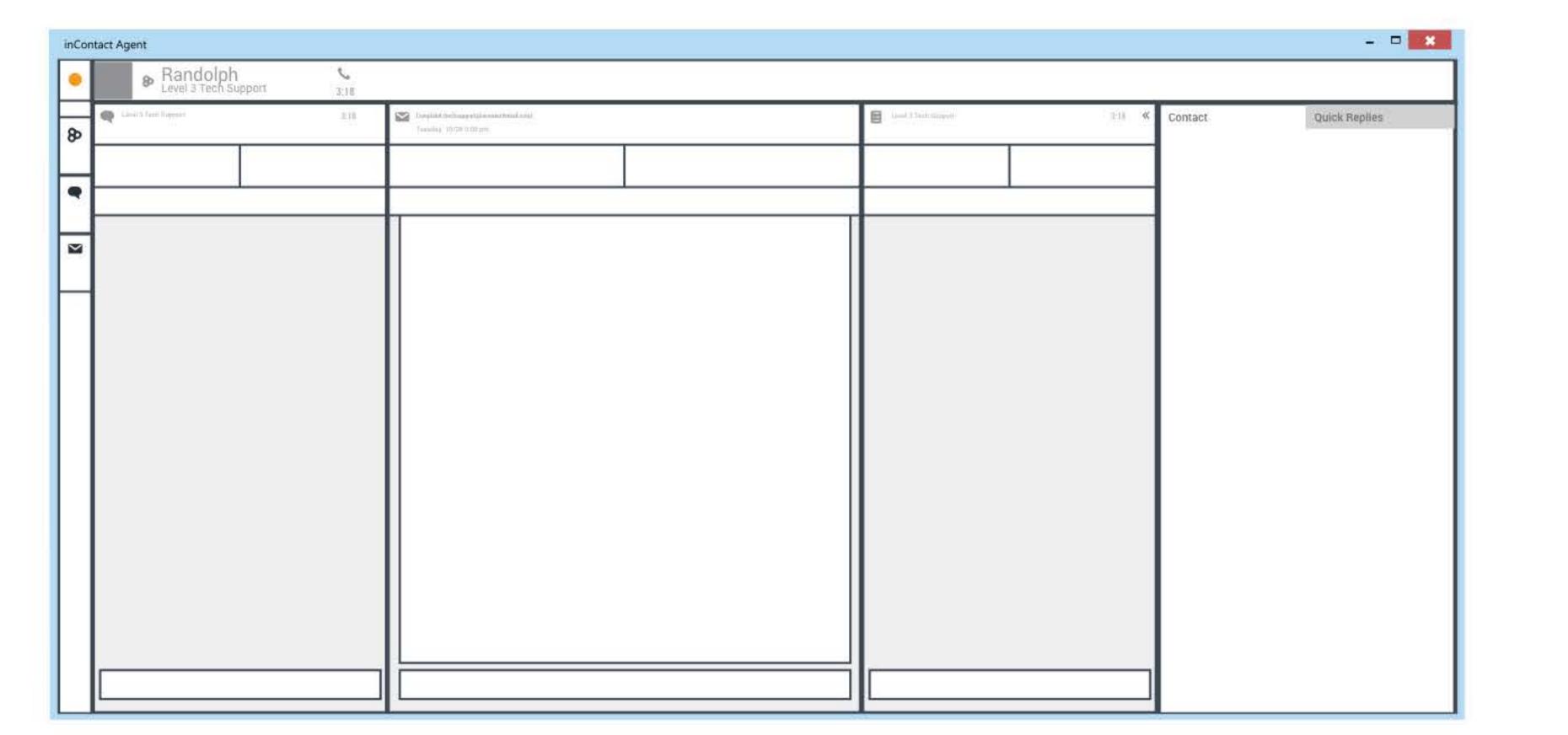
Wireframes for the main states of the app for this feature.









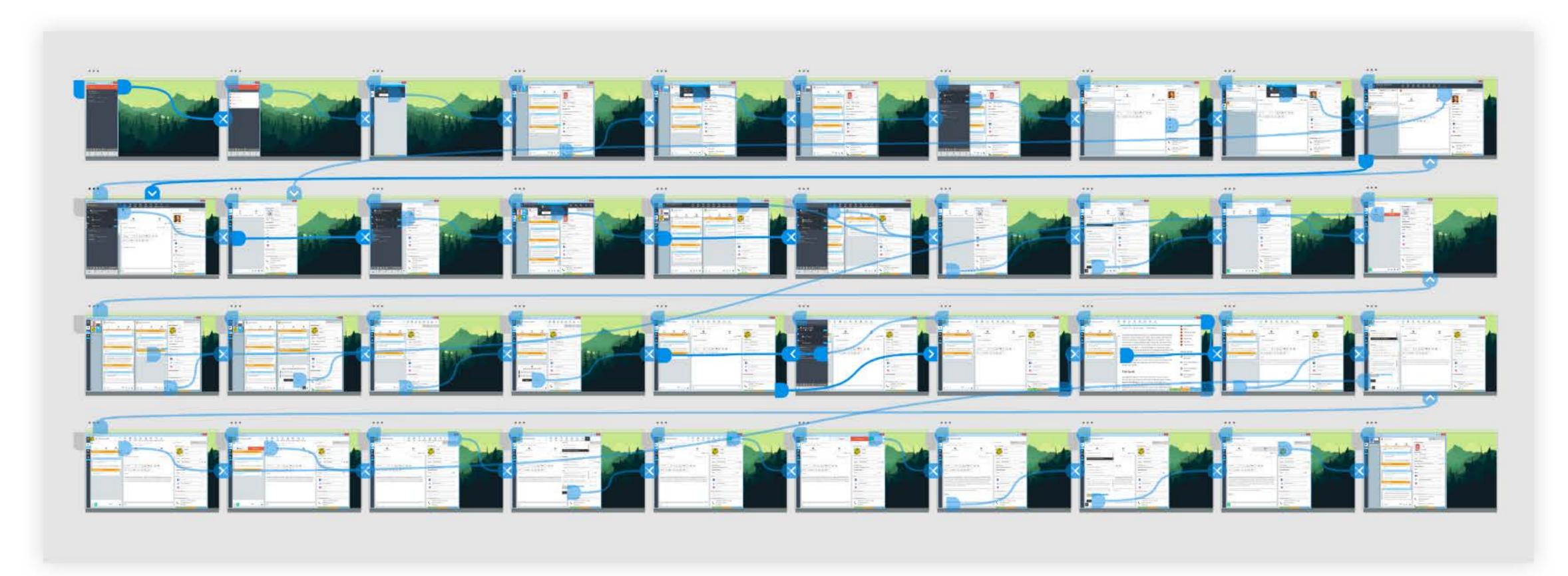


#### **USABILITY TESTING**

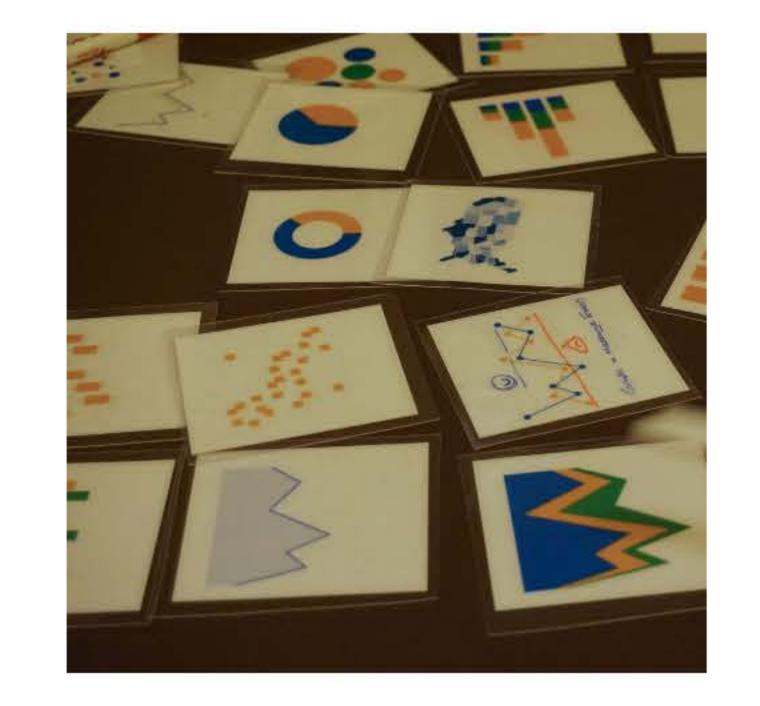
By testing this major new feature at our yearly user conference we were able to test with 22 customers and gain valuable insights prior to R&D work.

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104	Change schedule (breaks/lunch)	8							ė.					
104	Agent stats	7												
104	WFO manage callbacks	1												
106	View schedule	9							(1) 5(					
106	time off request	6												
106	adherence	4												
108	like outlook	2												
110	shift biding	2												
113	Manager messaging	6												
113	team ranking for competition	4							il St					
113	Real time agent stats	- 3			F2-									
113	Not too much WFO in MAX	3												
120	QM/evals	5												
104	worried about omni limits (agent load)	2												
104	doesn't understand dispo button	2												
104	are shaded emails unread or not selected?	1												
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104	Not sure which workspace is active from sidebar	2						i.						
104	Browser notifications are great	3												
106	Wants browser notifications to take you to contact	2												
104	Need better changelogs	1											1	
104	Elevating chat to call popup (field not clear)	6												
106	Thought that elevating chat to call would be through side bar	2							-					
104	Not sure if multichannel single (omni) dispositions should be separate	4												
108	Warm chat transfer	2												
104	Looking forward to contact card	3												
110	phone hyperlink	2						i i						
110	pin side bar open (permanent glance that pushes workspace)	2												
115	auto accept for emails	1												1
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106	Elevate chat to call pop up would cover phone number	j												
106	omni is better on multiple monitors								<i>(</i> !					
106	add dis should just be disposition for clarity												1	
106	but thin vs MAX is the ability to attach a picture to each option in the "La	aunch"	button acti	ons.									1	
108	Wants customer to be able to request elevation from chat		1	1					Ž.				1	
108	Thinks millennials want gifs in chat (increased engagement)			1									1	1
108	ents to elevate chat to phone whenever possible for better customer en	gagem	ent "	+				-					1	177
109	word cloud in contact card	Бавсии	CIIC.		/:			- 14	Q.					
108	Want cherry picking emails in MAX	-		8					-				1	-
120	Lock the style bar in email reply to scroll with the text			-				-	6			<del>                                     </del>	1	-
	to grant agents access to be pulled away from current contact when they	/ accon	t a now inco	oming conta	ct				Či-					-
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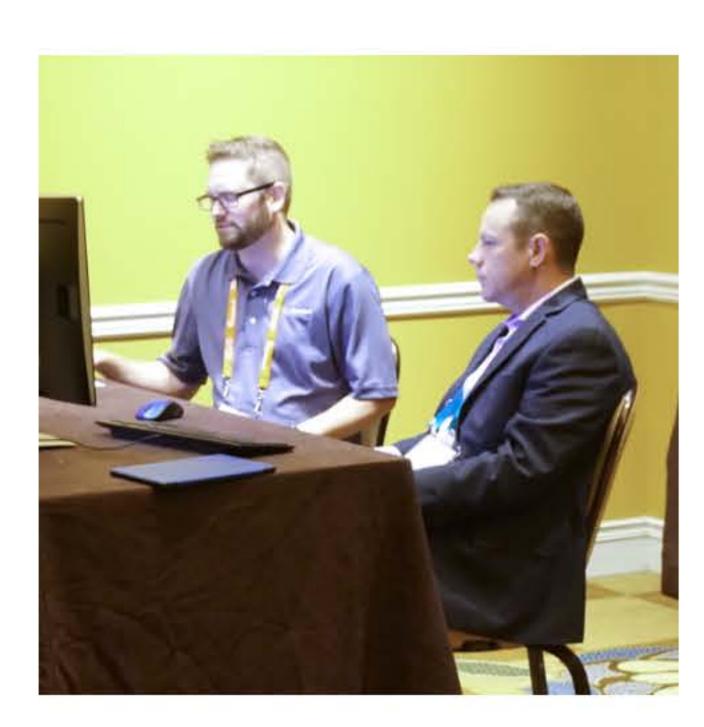


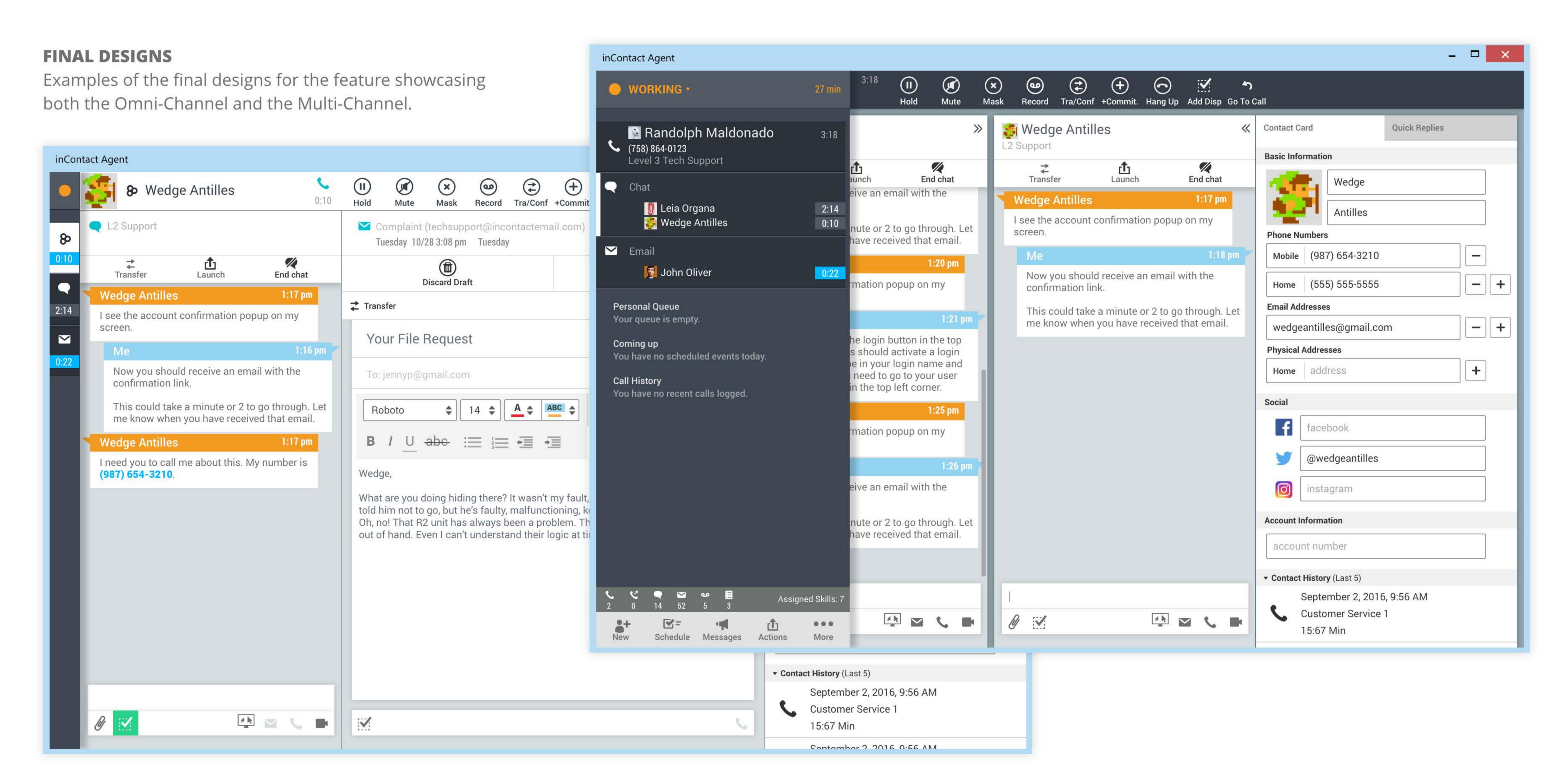


#### PROTOTYPE FOR USABILITY TESTING



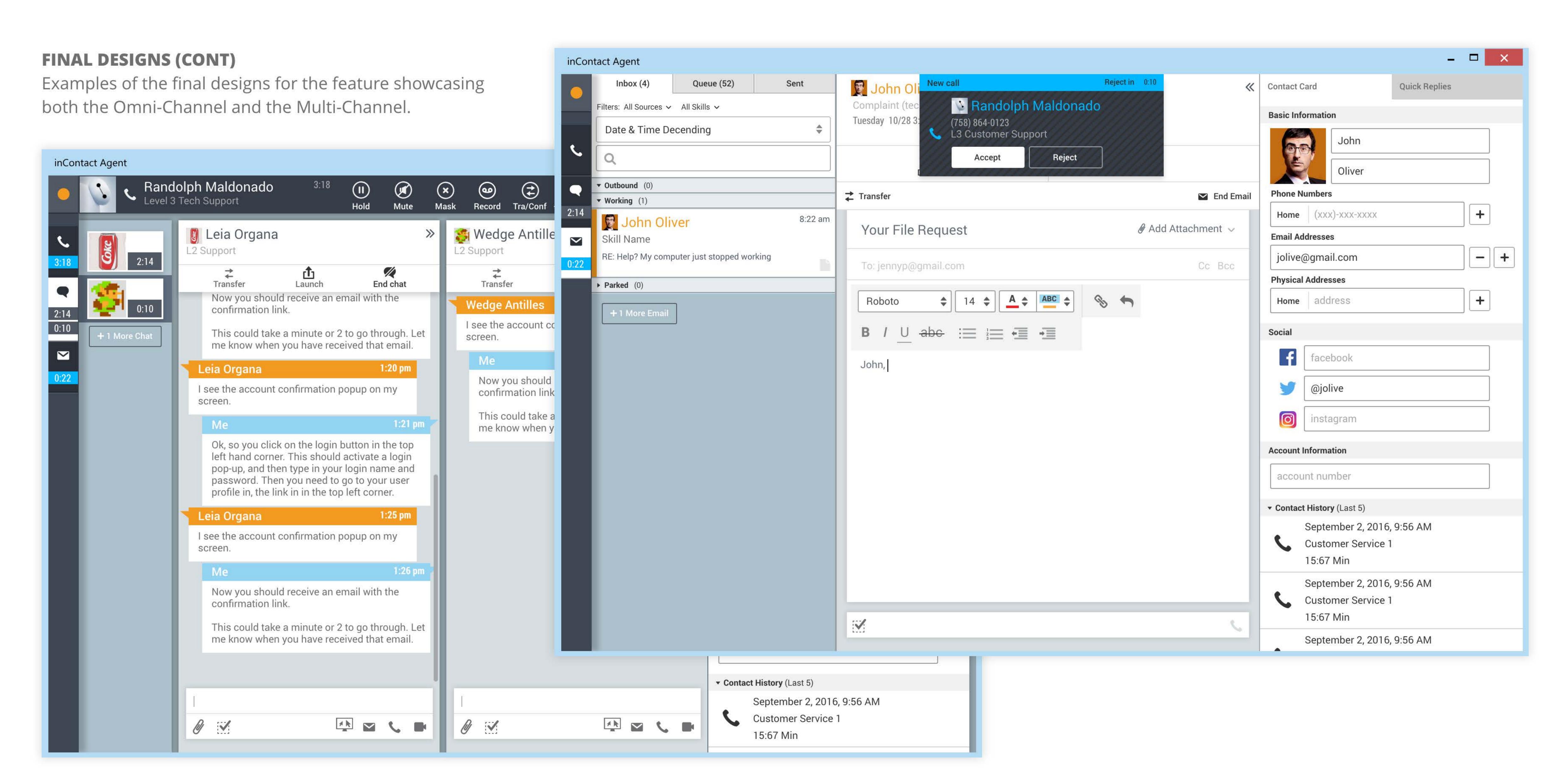






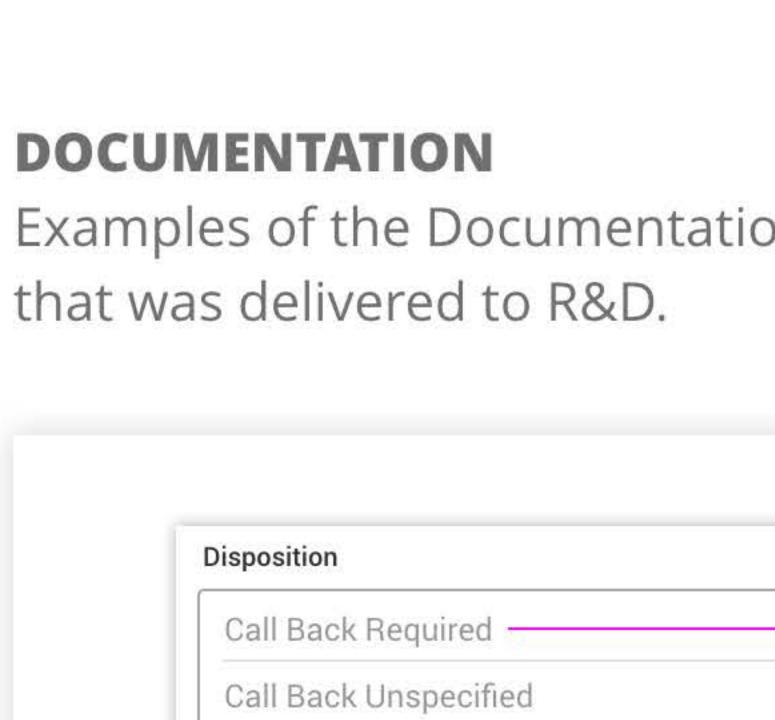


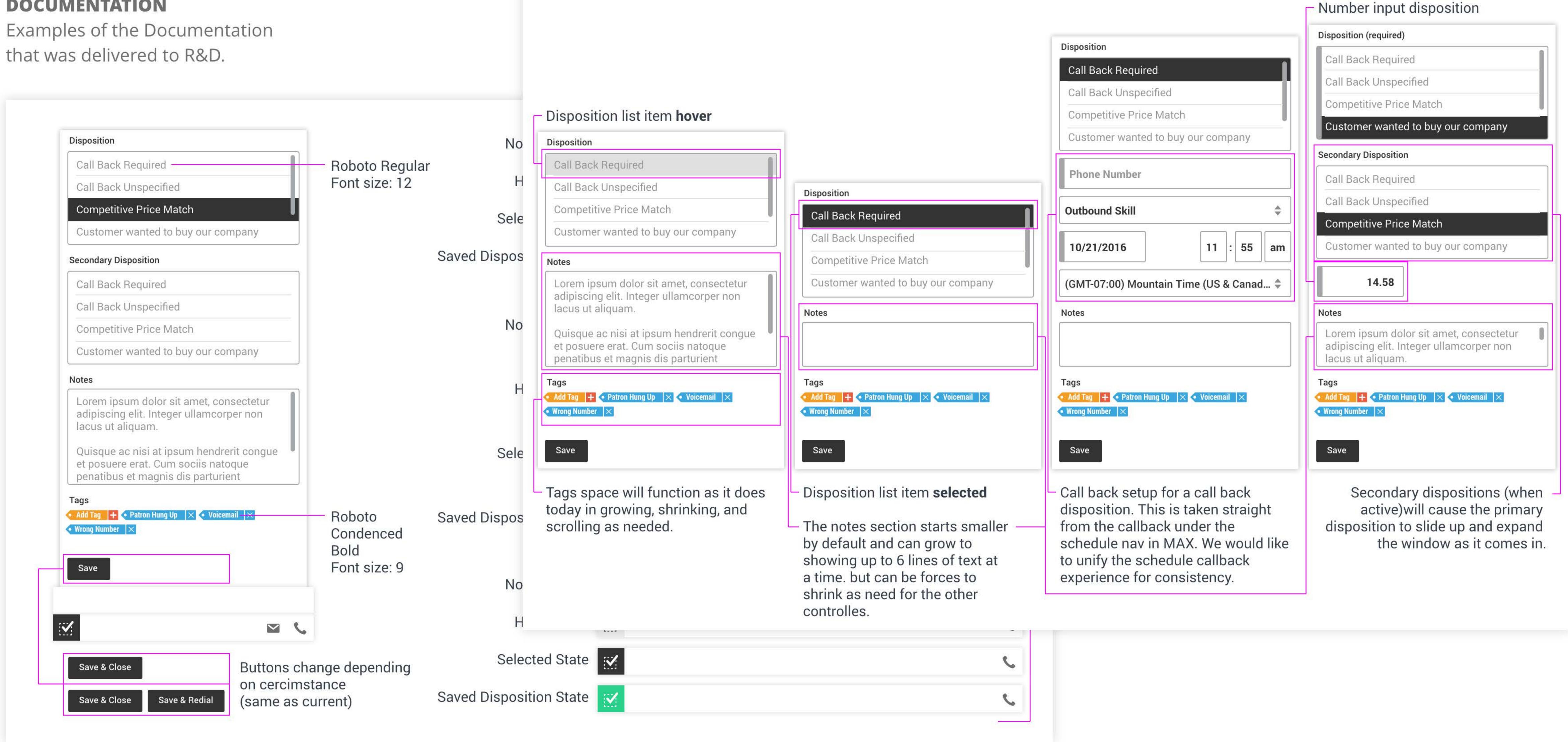










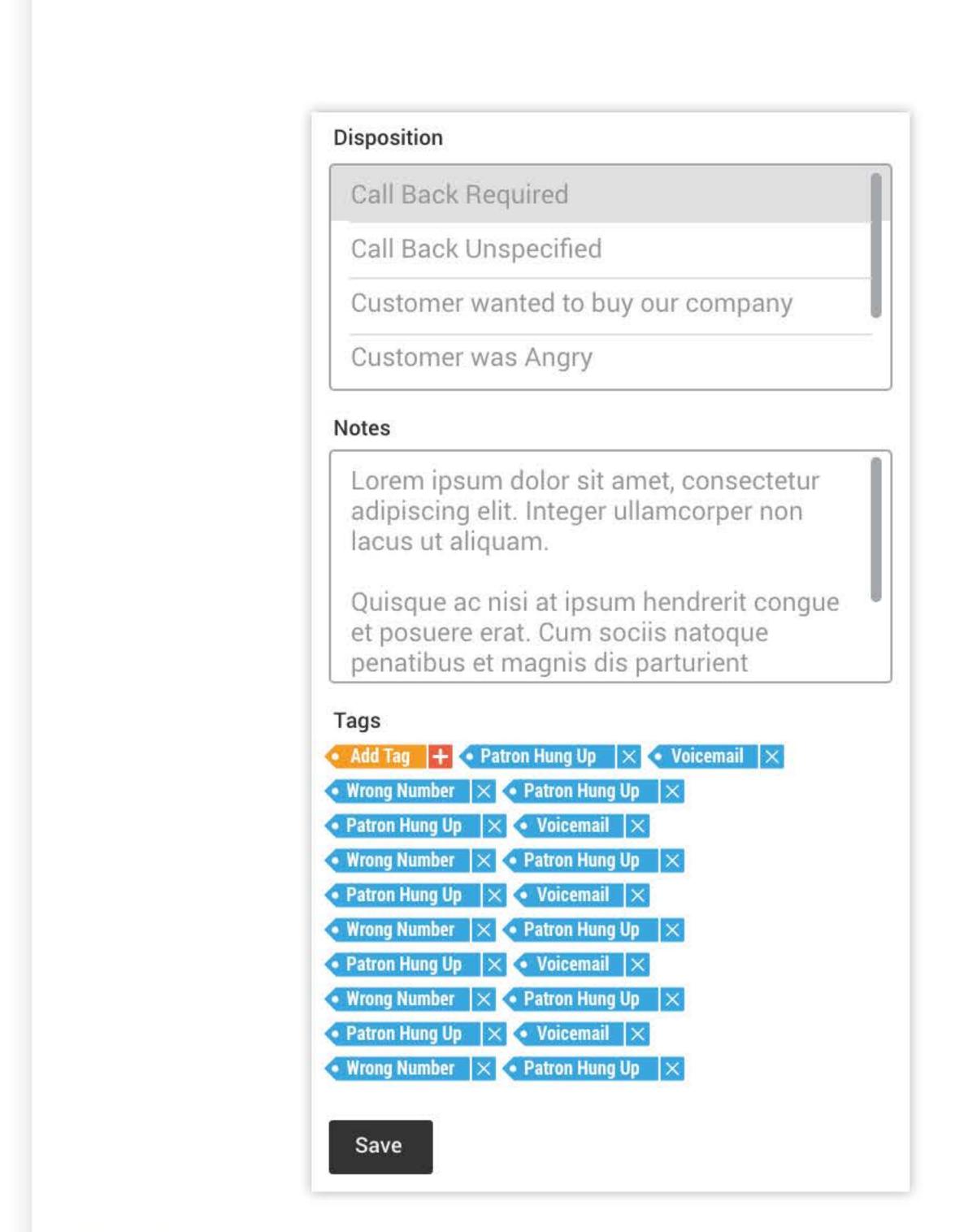


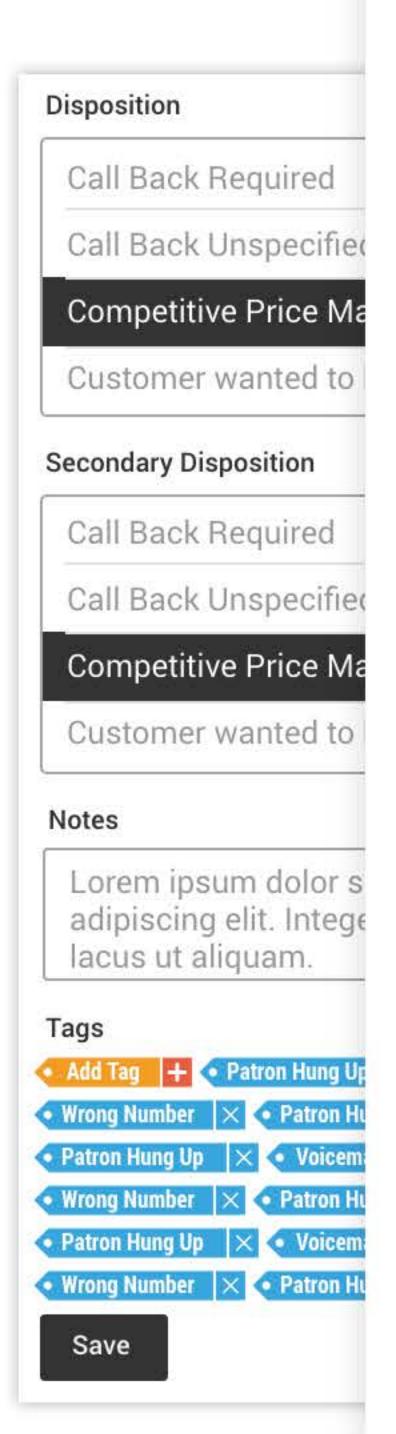






Examples of the Documentation that was delivered to R&D.





# Chat/Contact Card 44px WW Roboto Regular 21 WW 4px Mini Call Bar 43px WW Roboto Regular 20 Workspaces/New Contact Toast/Email Inbox 19px WW Roboto Bold 9 Padding: 2px Glance 15px ww Roboto Bold 7 ww Padding:





- The Disposition and tags area should use the same height (Max height for the Disposition sections is 4 lines).

- The tags area has a min height that fits the lable and 2 lines of tags.
- When the disposition has to shrink below 2 dispos showing then it becomes a dropdown.

Assumed max height of Disposition window for these examples.